



**BRIDGING HORIZONS**

Connecting Ideas, Leaders, and Futures

# Identifying & Capturing New Opportunities

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# Overview

Value Proposition

Marketing Strategies

Cross-Selling

Organization of Leads

Process of Follow-Up for Leads



# Value Proposition (8 minutes)

- How do you define a value proposition?
- What is your current value proposition?
- Does your team know the value proposition?
- How many times per year do you review/revamp your value proposition?

# Marketing Strategies (11 minutes)

- ❖ What are your current marketing strategies to bring in new leads to the organization?
  - Breakdown of leads between membership and consulting services (number of leads)
  - How much of the marketing team's effort goes into membership growth vs. consulting services?
- ❖ What new marketing strategies have you been experimenting with?
  - New strategies you have found to be successful and will be implementing in a bigger fashion
  - New strategies that you have found do not work



# Cross-Selling (10 minutes)

- ★ Do Non-Business Development staff have goals to bring in leads for the association?
  - How many leads do non-BDM staff bring in vs. BDM staff?
- ★ How many service lines does your consulting staff cover?
  - Do specific team members have specific lines?
  - Are all lines covered by the entire consulting staff (rotation)?
- ★ What cues do you look for to sell other lines?

# Organization of Leads (9 minutes)

- ❑ What systems do you use?
  - ❑ What do you use the system for (lead generation, organization, etc.)?
  - ❑ Do you have to use multiple systems to accurately track leads?
- ❑ Do you have sales meetings?
  - ❑ Who do you include?
  - ❑ What is the frequency?
- ❑ How are the leads transferred between lines?
  - ❑ Examples: phone call, email, CRM notification, etc.

# Lead Follow-Up (11 minutes)

- Who follows up with who?
  - ◆ How is it determined between BDM, consultant, other colleagues?
- Do you have a set follow-up cadence?
  - ◆ Emails, Phone Calls, Articles, etc.
- How long do you pursue a lead?
- Do you have a re-engagement marketing campaign if the lead goes cold and what does it entail?